Fry, Robert J. (for George F. Baker – Executor/Petitioner)

(1) Executor's Final Account and Report, (2) Petition to Approve Attorney Fees and Costs to (3) Authorize Reimbursement of Executor and Close Estate

DO	D: 12/12/06		GEORGE BAKER, Executor, is Petitioner.	NE	EDS/PROBLEMS/COMMENTS:
			Account period: 09/11/11 - not specified	1.	Notice of Hearing to Robert Baker and Michael Keith Russell were sent in care of Carrie Cook, and Notice to Steven
Cor	nt. from		Accounting - No Accounting		Russell was sent to Clint Yarbrough;
00.	Aff.Sub.Wit.		presented		notice mailed to a person in care of
√	Verified		Beginning POH - NOT STATED (I & A -		another is insufficient, pursuant to California Rules of Court 7.51 (a) (2).
✓	Inventory		\$192,447.72) POH - \$22,430.87 (all cash)	2.	No accounting is presented in the
✓	PTC		- 322,430.67 (dil cdsh)		Petition. Need Accounting or waivers
✓	Not.Cred.		Executor - statutory fee not		of accounting from:
✓	Notice of Hrg		addressed		Robert BakerMichael Russell
✓	Aff.Mail	w/			- Steven Russell
	Aff.Pub.		Executor reimbursement - \$11,124.17, plus 1995	3.	The Petition does not address the
	Sp.Ntc.		Nissan Sentra valued at \$2,200 (as reimbursement for mortgage payments on the		statutory fees to the Executor or attorney. The attorney is requesting
	Pers.Serv.		real property of the estate)		\$3,500.00, however there is explanation
	Conf. Screen		real property of the estate;		of this fee. Further, the Executor was
	Letters 03/19,	/07	Attorney - \$3,500.00 (no		previously represented by attorney Kim
	Duties/Supp		calculation of the statutory fee provided)		Herold until 09/11/09. As previous counsel for the Executor, Ms. Herold
	Objections				may be entitled to a portion of the
	Video Receipt		Costs - \$2,395.12 (no itemization		statutory fee, the Petition does not
	CI Report	<u> </u>	provided)		address the previous representation or
√	9202 Order	n/a	Public Guardian reimbursement - \$5,411.58 (for monies advanced for repairs on the real property asset of the estate) Petitioner states that after making these disbursements, there will be no assets remaining to pay other claims against the Estate or to make distributions to the Decedent's heirs. Upon making the payments and disbursements set forth above, the	 4. 5. 	apportionment of fees. The attorney is requesting to be reimbursed \$2,395.12, but there is no itemization or explanation of those costs. A Creditor's Claim was filed 04/03/07 by FIA Services in the amount of \$1,896.22. No allowance or rejection of creditors claim has been filed. The Petition indicates that there are not sufficient funds to pay this debt and that it will not be paid. An allowance or
			Executor asks that the Estate be closed and the Executor be discharged.		rejection of creditor's claim should be filed regarding this debt. Continued on page 2
	Aff. Posting		Petitioner filed his First Account and Status		viewed by: JF
	Status Rpt		Report on 12/12/06 – 09/10/11. At the hearing		viewed on: 08/28/13
	UCCJEA Citation		for the First Account on 10/20/11, the Court deferred judgment on the First Account to the		dates: commendation:
		n/a	date of the filing of the final account.		1 – Russell
		-	Continued on Page 2		

1 Martha Helen Russell (Estate)

Case No. 06CEPR01379

Page 2

Minute Order from hearing on First Account and Status Report on 10/20/11 states: Counsel Joanne Sanoian, as well as the brokers for the sale of real property, are also present. Ms. Sanoian objects and asks that the accounting not be approved. The Court notes that it would interlineate and accept an accounting, not ratify one. Additionally, the Court notes that an unemployed Michael Russell has been living in the house, primarily to have the house insured, but has benefited from living in the house, e.g. PG&E, and thus, his share should be adjusted. Since this matter depends on the close of escrow, this matter is continued to the date of the final accounting, whatever that date may become. Mr. Robert Fry has heard the objections and the stated concerns. Mr. Fry will not appear via Courtcall, but rather in person.

Kruthers, Heather H. (for Public Guardian – Conservator of the Estate – Petitioner)

(1) Second Account Current and Report of Successor Conservator and (2) Petition for Allowance of Compensation to Successor Conservator and Attorney

Age: 96			PUBLIC GUARDIAN, Conservator of the Estate,	NEEDS/PROBLEMS/COMMENTS:
			is Petitioner.	
			Account period: 6-18-11 through 6-17-13	CONTINUED TO 9-18-13 Per Petitioner request
>	Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg		Accounting: \$117,023.54 Beginning POH: \$73,881.95 Ending POH: \$3,927.13 (\$1,427.13 cash) Conservator: \$1,850.56 (6.61 Deputy hours @ \$96/hr and 16 Staff hours @ \$76/hr)	1. Need proof of service of Notice of Hearing at least 15 days prior to the hearing pursuant to Probate Code §§ 2621, 1460(b)(1) on Co-Conservators of the Person Harold Wooten and Wilhelmina Lamar, (Conservatee's son and daughter).
~	Aff.Mail	W	Attorney: \$1,250.00 (less than local rule)	
	Aff.Pub.			2. Need proof of service of Notice of
	Sp.Ntc.		Bond fee: \$88.94 (ok)	Hearing <u>with a copy of the petition</u>
	Pers.Serv.		Petitioner prays for an order:	at least 15 days prior to the hearing pursuant to Probate Code § 1252
	Conf. Screen		Approving, allowing and settling the 2 nd	on Kelly Porterfield pursuant to
	Letters		Account;	Request for Special Notice filed 12-
	Duties/Supp		2. Authorizing the conservator and attorney	28-10.
	Objections		fees and commissions;	
	Video Receipt		3. Authorizing payment of the bond fee;and4. Any other orders the Court considers	Need schedule and information re Conservatee's property in Texas per Probate Code §§ 2401.1 and
	CI Report		proper.	1063(h).
	9202			
>	Order			
	Aff. Posting			Reviewed by: skc
	Status Rpt			Reviewed on: 8-28-13
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 2-Wooten

2

Shekoyan, James E., of Baker Manock & Jensen (for John R. Panzak, Jr., Deceased Executor;

First and Final Account of Deceased Personal Representative (PC 10953)

DC	D: 3/12/2010	JAMES E. SHEKOYAN, legal representative for JOHN R. PANZAK, JR., Executor appointed on 8/11/2010, is Petitioner.	NEEDS/PROBLEMS/ COMMENTS:
		Account period: 3/12/2010 - 2/15/2013 Accounting - \$620,182.86	Note: Letters of Administration with Will Annexed issued to the
Со	nt. from	Beginning POH - \$575,843.31	Public Administrator on
	Aff.Sub.W	Ending POH - \$558,887.37	
-		(POH consists of brokerage account and vehicle.)	6/3/2013. Court may
✓	Verified	(1 Of 1 Collisis of blokerage account and vehicle.)	set status hearing for
✓	Inventory	Executor - not requested	the filing of the final account of the
1	PTC		successor personal
✓	110	Attomey - not requested	representative on
 	Not.Cred.		Friday, March 7, 2014,
	N-Pf	Costs - \$1,765.86	at 9:00 a.m. in
✓	Notice of	(filing fees, publication, certified copies; research by runner;	Department 303.
	Hrg	parking fees and travel/mileage to Court)	-
✓	Aff.Mail		 Petition requests
	Aff.Pub.	Petitioner states:	reimbursement of
		 Most of Decedent's assets were in the JOHN R. PANZAK 	\$9.72 for parking
	Sp.Ntc.	LIVING TRUST , which are not part of the probate estate;	expenses and
	Pers.Serv.	GORDON PANZAK, son, filed two litigation matters	mileage to Court,
	Conf.	between himself and the deceased personal	and \$36.00 for
	Screen	representative, JOHN PANZAK, JR., as the Executor of the	research by a
	Letters	estate; one of the litigation matters involves the probate	runner service,
	Duties/S	estate; the second matter is a civil litigation action filed by	which pursuant to
		Gordon Panzak (Case #11CECG00789) regarding the	Local Rule
	Objection	Decedent's trust and trust assets;	7.17(B)(3), (5) and
	Vid Rcpt	John Jr. was prepared to commence trial in the civil	(7) are not
	CI Report	litigation action, which was scheduled to begin on	reimbursable costs,
1	9202	12/12/2012; however, on 12/6/2012, Gordon dismissed this	such that the total
	0	case without prejudice, and on the same day, he filed a	cost reimbursement
✓	Order	new civil litigation action (Case #12CECG03842) citing the	amount should be
		same causes of action grievances as alleged in the action	\$1,720.14 .
		he just dismissed, such that the new complaint is a copy of	~Please see additional
		the complaint dismissed the same day [Note: Court	page~
	Aff. Post	records show the Case Management Conference in	Reviewed by:
	Status Rpt	12CECG03842 was continued to 10/15/2013, citing the	Reviewed on:
	UCCJEA	reason "service."]	Updates:
	Citation	~Please see additional page~	Recommendation:
1	FTB Notice		File 3 – Panzak
			3

Petitioner states, continued:

- The issues in the civil litigation matter are entwined with the issues in the probate estate; as soon as the civil litigation is resolved, John Jr. intended to close the probate estate;
- SHARON PANZAK, spouse of John Jr., petitioned this Court to become the successor personal representative
 citing conflicts of interest in the appointment of Gordon, who also petitioned this Court to be appointed as
 personal representative;
- On 4/29/2013, the Court appointed the **PUBLIC ADMINISTRATOR** as the successor personal representative of this estate;
- All claims filed with the Court or presented against the estate, consisting of claims by Gordon Pazak filed 12/8/2010 for claims such as rent waste, damage to property, conversion of truck, ½ interest in Santa Cruz real property, and various other items of personal property, totaling ~\$1,582,940.00, were rejected on 2/28/2011;
- The sole beneficiary of the estate is the JOHN R. PANZAK LIVING TRUST; Gordon has received the distributions he
 was entitled to under the terms of the Trust; the remaining assets of the Trust estate are distributed solely to John
 R. Panzak, Jr.;
- When John Jr. opened the estate brokerage account, he arranged to have the dividends paid into the account distributed to him monthly (please refer to Schedule D, Distributions to Beneficiary); Schedule D shows dividends from pre-August/2010 to 2/15/2013 distributed to John Jr. in the sum of \$61,168.76;
- John Jr. was entitled to receive the dividends through the Trust estate; additionally, John Jr. was paying the Decedent's bills and probate administration expenses from these assets;
- Petitioner requests approval of the monthly distributions to John Panzak, Jr.

Petitioner prays for an Order:

- 1. Settling, allowing and approving the First and Final Account of the attorney for the deceased personal representative;
- 2. Confirming and approving all acts and proceedings of the deceased personal representative, including the monthly distributions of the dividends paid to himself totaling \$61,168.76; and
- 3. Authorizing and directing the successor personal representative to pay to Baker Manock & Jensen the sum of \$1,765.86 for costs advanced to the estate.

Note: The devisee of the estate pursuant to Decedent's Will admitted to probate on 8/11/2010 is JOHN R. PANZAK, JR., Trustee of the JOHN R. PANZAK LIVING TRUST. Petition states the remaining assets of the Trust estate are distributed solely to John R. Panzak, Jr. It appears John R. Panzak, Jr. has received payments of \$61,168.76 from this Decedent's estate prior to court order approving such payments in contravention of Probate Code §§ 11603(a), 11640, and 11641.

4 Norma Woodrum (CONS/PE)

Case No. 12CEPR01132

Atty

Burnside, Leigh W (for Randy Woodrum – Petitioner)

Petition for Appointment of Probate Conservator of the Estate (Prob. C. 1820, 1821, 2680-2682)

Age: 87			RANDY WOODRUM , Son and Conservator of	NEEDS/PROBLEMS/COMMENTS:
			the Person, is Petitioner and requests	Note: If growted the County will not statute
			appointment as Conservator of the Estate	Note: If granted, the Court will set status hearings as follows:
			with bond of \$715,356.80.	Friday 11-1-13 for proof of bond
			Estimated value of estate:	Friday 2-7-14 for filing of I&A
	Aff.Sub.Wit.		Personal property: \$555,000.00 (IRA)	Friday 2-6-15 for filing of first account current
>	Verified		Annual income: \$92,640.00	
	Inventory		Petitioner states the Conservatee suffers	If the appropriate documents have been filed, the status dates may come off calendar.
	PTC		from Alzheimers/dementia and has severe	illed, the status dates may come oil calendar.
	Not.Cred.		short term memory loss. She is incapable of	
~	Notice of		taking care of finances, paying bills or	
	Hrg		handling any financial matters.	
>	Aff.Mail	W		
	Aff.Pub.		Court Investigator Samantha Henson filed a report on 8-28-13.	
	Sp.Ntc.		1epon on 6-26-13.	
>	Pers.Serv.	W		
~	Conf.			
	Screen			
>	Letters			
>	Duties/Supp			
	Objections			
	Video			
	Receipt			
	CI Report	Χ		
	9202			
_	Order			
	Aff. Posting			Reviewed by: skc
	Status Rpt			Reviewed on: 8-28-13
<u> </u>	UCCJEA			Updates: 8-29-13
Ľ	Citation			Recommendation:
	FTB Notice			File 4 – Woodrum

Mark T. Felmus (CONS/E)

5

Case No. 13CEPR00104

Atty Wright, Janet L (for Petitioner, Jeremy Felmus)
Atty Johnson, Summer (for Petitioner, Jeremy Felmus)

Atty Poochigian, Mark S. (for Proposed Conservatee Mark T. Felmus)
Status Conference

Petition for Approval of Settlement Agreement

MARK T. FELMUS, proposed conservatee, is **NEEDS/PROBLEMS/COMMENTS:** petitioner. Petitioner states **JEREMY FELMUS**, son, petitioned to have the PUBLIC GUARDIAN 1. Need Order appointed as conservator of the estate of his Cont. from father, MARK T. FELMUS. Aff.Sub.Wit. Verified On 2/7/2003 the court appointed the **PUBLIC GUARDIAN** (ex parte) as temporary Inventory Conservator of the estate. PTC Not.Cred. MARK T. FELMUS, conservatee, filed a Motion **Notice of Hrg** for Reconsideration of Order Granting Temporary Conservatorship. Aff.Mail W/ Among the allegations contained in the Aff.Pub. petition was that Mark T. Felmus was subject to Sp.Ntc. undue influence from Jamie N. Piearcy Pers.Serv. ("Jamie"), who is now Mark's wife. Specifically, the Conservatorship petitions allege that Jamie Conf. Screen wrongfully procured (i) a conveyance of an **Letters** undivided 1/2 interest in Mark's residence from **Duties/Supp** Mark to Jamie, and (ii) an assignment of the **Objections** proceeds of a Lincoln Financial Life Insurance policy having a death benefit of Video approximately \$500,000.00 from Mark to Jamie. Receipt Mark disputed the allegations of the CI Report Conservtorship petition. 9202 Χ Order Aff. Posting Reviewed by: KT Please see additional page Reviewed on: 9/3/2013 **Status Rpt UCCJEA Updates:** Citation **Recommendation: FTB Notice** File 5 - Felmus

Settlement Agreement:

Mark and Jeremy have entered into a Settlement Agreement ("the Agreement") effective as of July 18, 2013. The Agreement is conditional upon approval by this court. The Settlement Agreement is also conditional upon, among other things, (i) Jamie's conveyance of Jamie's Undivided Interest to Mark, and (ii) Jamie's assignment of the Policy Proceeds to Mark.

Petitioner herby requests that this Court enter an order approving the Settlement Agreement. Approval of the Settlement Agreement would be in the best interest of Mark. Moreover, it would allow Mark and Jeremy to end their dispute regarding the proposed conservatorship.

Pursuant to Paragraph 8 of the Settlement Agreement, following the Court's approval of the Settlement Agreement, and upon receipt by the parties of certain certifications required under paragraphs 6(a) and 6(b) of the Settlement Agreement, the parties intend to jointly request that the Court enter a further order vacating the Order Appointing temporary Conservator and the Order After Hearing (extending the temporary conservatorship). Petitioner requests that the Court entertain an ex parte joint request of the parties following court approval of the Settlement Agreement, and upon receipt by the parties of the certifications required under paragraphs 6(a) and 6(b) of the Settlement Agreement.

Wherefore, Petitioner prays for an Order:

- 1. Approving the Settlement Agreement;
- Authorizing the parties to jointly file a request (by motion or otherwise) for vacation of the Order Appointing
 Temporary Conservator and the Order after Hearing, and providing that such request shall be considered
 ex parte.

Gale, Barton D. (of Berkeley, for Joan Gouveia – Daughter – Petitioner)

Petition for Probate of Will and for Letters of Administration with Will Annexed; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD:	10-2-06	JOAN GOUVEIA, Daughter, is Petitioner	NEEDS/PROBLEMS/COMMENTS:
		and requests appointment as Administrator	Need proof of publication per §8120.
		with Will Annexed without bond.	Need proof of publication per §8120. The Court may require bond in the
		Full IAEA – need publication	amount of \$350,000.00.
		FUITAEA - Need publication	
	Aff.Sub.Wit.	Holographic Will dated 9-1-55	Note: If granted, the Court will set status hearings as follows:
~	Verified	(Proof of Holographic Instrument filed)	Friday 11-1-13 for filing of bond, if
	Inventory	1	requried
	PTC	Residence: Fresno	Friday 2-7-14 for filing of I&A
	Not.Cred.	Publication: need publication	Friday 2-6-15 for filing of first account or petition for final distribution
N/A	Notice of	Estimated value of estate:	If the proper documents are on file prior to
1 47 .	Hrg	Real property: \$350,000.00	the hearings pursuant to local rules, the status
	Aff.Mail		hearings may come off calendar.
	Aff.Pub.	Probate Referee: Rick Smith	
	Sp.Ntc.	1	
	Pers.Serv.		
	Conf.		
	Screen		
~	Letters		
~	Duties/Supp		
	Objections		
	Video]	
	Receipt		
	CI Report		
	9202	 -	
~	Order	 	
	Aff. Posting	 	Reviewed by: skc
	Status Rpt	4	Reviewed on: 8-28-13
	UCCJEA	4	Updates:
	Citation	4	Recommendation:
	FTB Notice		File 6 – Gouveia

Armas, J. Todd (pro per Petitioner)

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DO	D: 6/28/2012		J. TODD ARMAS, named executor without	NEEDS/PROBLEMS/COMMENTS:
			bond, is petitioner. Full IAEA – o.k.	#6 of the petition was not answered re: next of kin.
Со	nt. from Aff.Sub.Wit.	S/P	Will dated: 1/5/2006	#8 of the petition does not identify the relationship to the decedent of
✓	Verified		Residence: Fresno Publication: Fresno Business Journal	the persons listed.
	Inventory PTC			Petition does not include a copy of the decedent's will (attachment
	Not.Cred.		Estimated value of the estate:	3e(2)).
	Notice of Hrg		Personal property - \$ 500.00 Real property - \$100,000.00	4. Need Duties and Liabilities.
√	Aff.Mail Aff.Pub.		Total - \$100,500.00	5. Need supplement to Duties and Liabilities.
	Sp.Ntc.		Probate Referee: Rick Smith	6. Need Order
	Pers.Serv.			
	Conf.			7. Need Letters
	Screen			Note: If the petition is granted, status
	Letters	Χ		hearings will be set as follows:
	Duties/Supp	Χ		1,0 cm 1,
	Objections			• Friday, January 31, 2014 at 9:00 a.m.
	Video Receipt			in Department 303, for the filing of the inventory and appraisal.
	CI Report			Fiden Nevertel at 7 0014 at 0.00
	9202 Order	X		Friday, November 7, 2014 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final
				distribution.
				Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.
	Aff. Posting			Reviewed by: KT
	Status Rpt			Reviewed on: 8/28/2013
<u> </u>	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 7-Cole
				7

Salazar, Steven F (for Petitioner Carilyn Maekawa)

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DC	D: 5/28/2013		CARILY MAEKAWA, named alternate	NEEDS/PROBLEMS/COMMENTS:
			executor without bond, is petitioner.	
			Other named executors are deceased.	
	nt. from			Note: If the petition is granted, status
<u> </u>	Aff.Sub.Wit.	S/P	Full IAEA – o.k.	hearings will be set as follows:
<u> </u>		3/1	Will dated: 5/23/1996	• Friday, January 31, 2014 at 9:00 a.m.
	Verified		71111 331031072571770	in Department 303, for the filing of
	Inventory		Residence: Fresno	the inventory and appraisal.
	PTC		Publication: Fresno Business Journal	
	Not.Cred.			• Friday, November 7, 2014 at 9:00
	Notice of			a.m. in Department 303, for the filing of the first account or petition for final
_	Hrg			distribution.
✓	Aff.Mail	W/		
✓	Aff.Pub.		Estimated value of the estate: Personal property - \$150,000.00	Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the
	Sp.Ntc.		1 ciscinal property	date set the status hearing will come off
	Pers.Serv.			calendar and no appearance will be
	Conf.			required.
	Screen		Probate Referee: Rick Smith	
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video			
	Receipt			
<u></u>	CI Report			
	9202			
✓	Order			
	Aff. Posting			Reviewed by: KT
	Status Rpt			Reviewed on: 8/28/2013
	UCCJEA			Updates:
	Citation			Recommendation: SUBMITTED
	FTB Notice			File 8 – Maekawa
				8

Haught, Rex A. (for Akiko Yorizane – Sister – Petitioner)

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DO	D: 4-19-13		AKIKO YORIZANE , Sister and named Executor without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: Note: The Court will set status hearings as
			Full IAEA — ok	follows: • Friday 11-1-13 for filing of bond, if
· · · · · · · · · · · · · · · · · · ·	Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail Aff.Pub.	s/p w/o	Will dated 4-15-10 Residence: Selma, CA Publication: Selma Enterprise and Kingsburg Recorder Estimated Value of Estate: Real property: \$330,000.00 Probate Referee: Steven Diebert	required Friday 2-7-14 for filing of I&A Friday 2-6-15 for filing of first account or petition for final distribution If the proper documents are on file prior to the hearings pursuant to local rules, the status hearings may come off calendar.
	Sp.Ntc. Pers.Serv. Conf. Screen			
>	Letters Duties/Supp Objections			
	Video Receipt			
→	CI Report 9202 Order			
	Aff. Posting Status Rpt UCCJEA			Reviewed by: skc Reviewed on: 8-28-13 Updates:
	Citation FTB Notice			Recommendation: SUBMITTED File 9 – Yorizane

Atty Aguirre, L. Kim (Attorney for Mark Carlson Lee – Conservatee)
Atty Kruthers, Heather H. (for Public Guardian – Conservator)
Status Hearing Re: Accounting from Mr. Aguirre

Age: 63	PUBLIC GUARDIAN is Conservator of the Person	NEEDS/PROBLEMS/COMMENTS:
	and Estate.	Examiner Notes previously noted:
	Public Guardian's First Account was settled on 7-31-13.	On 7-31-12, the Court authorized payment of \$7,000.00 to L. Kim Aguirre, attorney for the
Aff.Sub.Wit.	On 7-31-13, pursuant to Examiner Notes, the	Conservatee, for use in securing appropriate housing and
Verified	Court set this status hearing for accounting of	transportation and ordered the funds
Inventory	\$9,000.00 authorized to Attorney L. Kim Aguirre.	placed in an appropriate account to
PTC	Mr. Aguirre filed an "Accounting of Funds	be used for that limited purpose. On 11-8-12, an ex parte petition was filed
Not.Cred.	Advanced to L. Kim Aguirre to Secure Living	that stated the Conservatee found
Notice of Hrg	Arrangement for M. Carlson Lee" on	an apartment and was required to
Aff.Mail	8-21-13.	pay "several thousand dollars" for first and last months' rent and deposit,
Aff.Pub.	Mr. Aguirre states funds received and expended	and additional funds were needed.
Sp.Ntc.	is as follows:	The Court authorized an additional
Pers.Serv.	15 d3 10 n0 113.	\$2,000.00 on 11-9-12.
Conf. Screen	Payment to apartment (First, Last, Deposit):	Petitioner's disbursements schedule reflects the funds paid to Mr. Aguirre,
Letters	\$5,190.00	but does not provide a breakdown
Duties/Supp	Paymont to Establish Visa Card for Miss	of how those funds were used.
Objections	Payment to Establish Visa Card for Misc. Expenses: \$1,000.00	Further, the disbursements schedule
Video	Δ 40 01 10001 Φ 1/200100	includes housing and transportation costs during this time frame that
Receipt	Diana Martinez (assist in securing facility, move,	appear to have been arranged and
CI Report	etc., per Exhibit A): \$1,062.50	paid for by the Public Guardian as
9202 Order	Laura Depfyffer (Assistant to L. Kim Aguirre), coordinating contact with M. Carlson Lee; Harper, Martinez @ \$20/hr per Exhibit B: \$1,036.00	Conservator, outside of the \$9,000.00 paid to Mr. Aguirre. See also the extensive itemization of time spent by the Conservator on these matters.
	Mr. Aguirre continues to hold the remaining \$711.50 fbo Mr. Lee. No billing by Ms. Depfyffer since 10-15-12. It is believed that once she	Need clarification regarding the \$9,000.00 paid to Mr. Aguirre. See Page 2
Aff. Posting	compiles that biling the amount due will exceed	Reviewed by: skc
Status Rpt	the \$711.50.	Reviewed on: 8-28-13
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 10 – Lee

10

Page 2

1. The Court may require clarification as to the \$1,036.00 for Billing for Services provided by Laura dePfyffer, who is Mr. Aguirre's assistant.

Examiner Notes that attorneys' secretarial services are considered costs of doing business and not reimbursable per local rules. Here, all line items appear to be office telephone conversations with the client. Were the funds allotted for Mr. Lee's used to pay the attorney's assistant an hourly rate on top of her salary, or in lieu of, or in addition to? Attorney fees are subject to applicable petition and notice requirements according to the Probate Code and Cal. Rules of Court, but these services appear to fall under our local rule re cost of doing business.

2. The Court may require clarification as to who Diana Martinez is, and her qualifications to provide moving services.

Pro Per Buendia, Marie (Pro Per Petitioner, maternal great-grandmother)

Petition for Termination of Guardianship

Ag	e: 12 years	MARIE BUENDIA, maternal great-grandmother and	NEEDS/PROBLEMS/ COMMENTS:
		Guardian appointed on 1/4/2006, is Petitioner.	COMMENTS.
Со	nt. from	Father: MANUEL GARCIA ; Declaration of Due Diligence filed 7/3/2013.	Need Notice of Hearing and proof of 15 days' service
	Aff.Sub.Wit.	Mother: JENNIFER BUENDIA ; consents and waives notice.	by mail of the
✓	Verified	Ward consents and waives notice.	Notice of Hearing with a copy of the
	Inventory		Petition for
	PTC	Paternal grandfather: Not listed.	Termination of
	Not.Cred.	Paternal grandmother: Not listed.	Guardianship, or
	Notice of Hrg	Maternal grandmother: <i>Not listed.</i> Maternal grandfather: <i>Not listed</i> .	Consent to Termination and
	Aff.Mail >		Waiver of Notice, or
	Aff.Pub.	Petitioner states the child's mother has 3 years of sobriety,	a Declaration of
	Sp.Ntc.	she is stable financially, and the child wants to be with his	Due Diligence, for:
	Pers.Serv.	mother. Petitioner states she is 76 years old and she needs	Manuel Garcia, father; if Court does
	Conf. Screen	time out for herself.	not find due diligence.
	Letters	Declaration filed by Petitioner Marie Buendia on 8/21/2013	Miguel Melendez, Jr.,
	Duties/Supp	states: she and her husband, Eddie Buencia received	sibling, if age 12 or
	Objections	guardianship of Joseph, their great-grandson on	over;
	Video	7/27/2005, since their granddaughter (Jennifer) was not	 paternal grandparents;
	Receipt	able to care for him because of her history of substance	granaparenis,maternal
✓	CI Report	abuse and instability; Jennifer has been clean for almost 4 years, and is doing well; she loves her son and wants him	grandparents.
	9202	with her; her husband, Co-Guardian Eddie Buendia,	
√	Order	passed away 4 years ago on 8/22/2009, and she needs	
_	A# Doaller	time for herself as it's been 4 years that she hasn't had a	Deviewed by 7 LTC
\vdash	Aff. Posting	vacation and she could use one; Joseph loves his mother and wants to be with her.	Reviewed by: LEG
	Status Rpt UCCJEA		Reviewed on: 8/27/13 Updates: 8/30/13
	Citation	Court Investigator Jennifer Young's Report filed 8/29/2013	Recommendation:
\vdash	FTB Notice	-	File 11 – Buendia
	I ID IAOIICE		THE TT - DUCTION

Quinteros, Caroline (Pro Per –Petitioner -Maternal Grandmother)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Ag	e: 3 ½ years	Temporary Denied on 07/15/2013	NEEDS/PROBLEMS/COMMENTS:
\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \	Int. from Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of XHrg Aff.Mail X Aff.Pub. Sp.Ntc. Pers.Serv. X Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202 Order	CAROLINE QUINTEROS, maternal grandmother, is Petitioner. Father: UNKNOWN Mother: YVETTE MONICA VASQUEZ; consents and waives notice. Paternal grandfather: Unknown Paternal grandmother: Unknown Maternal grandfather: Deceased Petitioner states the mother has drug problems and instability, and the child lived with Petitioner since birth, with Petitioner providing all financial support and care for the child since his birth. Petitioner states the mother neglected the child but would suddenly just take him, and when Petitioner confronted the mother about her drug issues and neglect of the child, the mother would tell Petitioner to take the child because she did not care for or want the child. Petitioner states at this time, the child and his siblings were taken from the mother by Sacramento CPS, and they were placed with different	 Note: Petition and UCCJEA indicate the child currently lives in Sacramento with a non-relative. Need Notice of Hearing. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: Father (Unknown) Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: Paternal Grandparents (Unknown)
	Aff. Posting Status Rpt UCCJEA	family members, and although the child was living with Petitioner and her spouse, on 6/18/2013, Petitioner received a phone call	Reviewed by: LV Reviewed on: 08/29/2013 Updates: 09/03/2013
✓ 	Citation	from a Sacramento County social worker stating Petitioner had to bring the child back	Recommendation:
	FTB Notice	to that county until they decided where they would place him, or the county would issue a warrant on Petitioner and her spouse.	File 12 – Vasquez

12

12 (additional page) Joziah Nicholas Vasquez (GUARD/P) Case No. 13CEPR00582

Petitioner requests to be excused from giving notice to the father as he is unknown to Petitioner, and the two persons the mother claimed to be the father were found not to be, and the one additional person the mother thinks might be the father is completely unknown to Petitioner.

Court Investigator Jo Ann Morris' report filed 08/29/2013.

Salinas, Rita (Pro Per – Petitioner – Maternal Grandmother)
Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Ath	ena 2		NO TEMPORARY REQUESTED	NEEDS/PROBLEMS/COMMENTS:
Nat	haniel 1			
			RITA SALINAS, maternal grandmother, is	Need Notice of Hearing.
			petitioner.	2. Need proof of personal service
Со	nt. from		Forther of Atheneus DOMAINIONE BUCTAMAANTE	fifteen (15) days prior to the hearing
	Aff.Sub.Wit.		Father of Athena: DOMINIQUE BUSTAMANTE	of the Notice of Hearing along with a copy of the Petition for
1	Verified		Father of Nathaniel: DANIEL OCHOA ,	Appointment of Guardian or
	Inventory		Declaration of Due Diligence filed 07/02/2013	consent and waiver of notice or
	PTC		Mother: RACHEL RENEE SALINAS	declaration of due diligence for: • Dominique Bustamante
	Not.Cred.		MOITIEL RACHEL REINEE SALINAS	(father of Athena)
	Notice of Hrg	Х	Paternal Grandparents of Athena: Not Listed	 Daniel Ochoa (father of Nathaniel) – Unless the Court
F	Aff.Mail	Х	Paternal Grandparents of Nathaniel: Unknown	dispenses with notice.
	Aff.Pub.		Maternal Grandfather: Abel Salinas	Note: Declaration of Due Diligence filed 07/02/2013 does not provide any
	Sp.Ntc.		Maternal Grandiainer: Abel Salinas	information regarding efforts to locate
	Pers.Serv.	Χ	Petitioner states: mother, Rachel Salinas, is unfit	Daniel Ochoa. • Rachel Renee Salinas
✓	Conf.		and is on drugs, does not have a steady home	Kacriei keriee saiirias (Mother)
-	Screen		for the children, and she is currently out on bail.	, ,
✓	Letters		Court Investigator Jennifer Daniel's report filed	3. Need proof of service fifteen (15) days prior to the hearing of the
✓	Duties/Supp		08/28/2013.	Notice of Hearing along with acopy of the Petition for Appointment of
	Objections			Guardian or consent and waiver of
	Video			notice or declaration of due
	Receipt			diligence for:
✓	CI Report			 Paternal Grandparents of Athena (Not Listed)
	9202			Paternal Grandparents of
	Order			Nathaniel (Unknown)
				 Abel Salinas (Matemal Grandfather)
				Grandian ion
	Aff. Posting			Reviewed by: LV
	Status Rpt			Reviewed on: 08/29/2013
✓	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 13 – Bustamante & Ochoa

14 Princess Rivera, Thaliana Rivera & Makayla Rivera (GUARD/P)

Case No. 13CEPR00747

Pro Per Rivera, Sr., Victor M. (Pro Per Petitioner, paternal grandfather)
Pro Per Rivera, Belia (Pro Per Petitioner, paternal grandmother)

Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)

Princess Age: 9 years		ars		NEEDS/PROBLEMS/COMMENTS:
Thaliana Age: 7 years		ars	General Hearing set for 10/28/2013	Note: Temporary petition
Ma	kayla Age: 5 ye	ears	VICTOR AAANUEL BIVERA CR I DELLA BIVERA	appears to be a copy rather
Со	nt. from		VICTOR MANUEL RIVERA, SR. and BELIA RIVERA,	than containing original
	Aff.Sub.Wit.		paternal grandparents, are Petitioners.	signatures as required.
✓	Verified		Father: VICTOR MANUEL RIVERA, JR.; consents and	1. If Court does not excuse
	Inventory		waives notice. Personally served 8/29/2013.	notice as requested by
	PTC		Mother: GEORGINA (GINA) FRIETZE ISLAS	Petitioners, need proof of five (5) court days' notice
	Not.Cred.		A A set a read of settle are less in a large so not notice a large	by personal service of the
✓	Notice of Hrg		Maternal grandfather: Javier Islas; sent notice by mail 8/29/2013.	Notice of Hearing with a
✓	Aff.Mail	W/	Maternal grandmother: Sandy Crane; sent notice by mail 8/29/2013.	copy of the Petition for Appointment of
	Aff.Pub.		Sy 111an 6/27/2010.	Temporary Guardian, or
	Sp.Ntc.		Petitioners state both of the parents have drug	Consent to Appointment
✓	Pers.Serv.	W/	problems and do not have their own place to live, and Petitioners have been caring [on and off] for	of Guardian and Waiver of Notice, or a Declaration of
✓	Conf. Screen		the children since October 2010. Petitioners state	Due Diligence for:
✓	Letters		CPS has been involved, as the maternal grandmother reported the mother because the	 Georgina (Gina) Islas, mother.
✓	Duties/Supp		mother was still using drugs and staying in different	
	Objections		places with the children and was pregnant with her 4th child. Petitioners state the mother was kicked out	
	Video Receipt		of her drug program in November 2012 for using drugs again. Petitioners state the father had been	
	CI Report		living with the children at different relative's homes,	
	9202		but his drinking and drug abuse was getting out of	
✓	Order		control and the relatives told him to leave.	
	Aff. Posting		Petitioners state a CPS Team Decision Meeting was held on 12/3/2012, and the mother agreed the	Reviewed by: LEG
	Status Rpt		children would stay with Petitioners until the mother	Reviewed on: 8/27/13
✓	UCCJEA		completed a program (copy of TDM attached.)	Updates: 8/30/13
	Citation			Recommendation:
	FTB Notice		Petitioners request to be excused from giving notice to the mother and maternal grandfather as they have made reasonable efforts to find them, but	File 14 – Rivera
			have not been able to find them.	

Pro Per Vargas, Martin (Pro Per Petitioner, maternal grandfather)
Pro Per Vargas, Angela (Pro Per Petitioner, maternal grandmother)

Petition for Appointment of Temporary Guardian of the Person

Jenesis Age: 5 yrs				NEEDS/PROBLEMS/COMMENTS:
			TEMPORARY GRANTED EX PARTE EXPIRES 9/4/2013	
Lavi Age: not stated				Note: Proof of Personal Service
			General Hearing set for 10/23/2013	filed 8/26/2013 shows personal
				service was made on
Со	nt. from		MARTIN VARGAS and ANGELA VARGAS, maternal	8/23/2013 to the <u>Petitioners</u> .
	Aff.Sub.Wit.			1. Need proof of five (5) court
	Verified		grandparents, are Petitioners.	days' notice by personal
\			Father: ANTHONY McELROY	service of the Notice of
	Inventory		Tainer. Addition McLLROT	Hearing with a copy of the
	PTC		Mother: MELISSA VARGAS	Petition for Appointment of
	Not.Cred.			Temporary Guardian, or
✓	Notice of Hrg		Paternal grandfather: Anthony McElroy, Sr.	Consent to Appointment of Guardian and Waiver of
	Aff.Mail		Paternal grandmother: Maria Nunez	Notice, or a Declaration of
	Aff.Pub.		Petitioners state the father, Anthony, is abusive both	Due Diligence for:
	Sp.Ntc.		physically and verbally to the children, and the	2. Melissa Vargas,
	Pers.Serv.	Χ	mother fails to protect the children, who are afraid of	mother;
1	Conf. Screen		their father. Petitioners state on 8/13/2013 an incident	Anthony McElroy, father.
Ě	I all a un		occurred which causes them to doubt whether the	idiri c i.
	Letters		father is in the right state of mind: the father had given	
✓	Duties/Supp		Jenesis a taco with veggies, but Jenesis does not care for red-colored foods so she refused to eat it; the	
	Objections		father insisted and grabbed the child by the arm and	
	Video		took her into her mother's room and shut the door;	
	Receipt		Petitioners' daughter Johanna heard Jenesis	
	CI Report		screaming and ran into the room, Jenesis ran toward	
	9202		her, and Anthony grabbed her by the throat and	
	Order		literally picked her up; Johanna's husband grabbed	
	Aff. Posting		Anthony away from Jenesis and told Anthony he cannot do that (please see photos attached as	Reviewed by: LEG
	Status Rpt		Exhibit A). Petitioners state the mother has been in an	Reviewed on: 8/28/13
✓	UCCJEA		abusive relationship with Anthony since they can	Updates:
	Citation		remember, and had moved away to Georgia for a	Recommendation:
	FTB Notice		year, but returned to Fresno and Petitioners state it is	File 15 - McElroy
			likely because of the abuse. Petitioners state the children have been traumatized and are scared of	-
			their father, and the mother does nothing to protect the children from their abusive father.	
			THE CHIMICH HOLL ADOSTYC MILICI.	15

McAuliffe, Shirley (Pro Per – Maternal Grandmother – Petitioner)

Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)

Age: 1 month			GENERAL HEARING 10-23-13	NEEDS/PROBLEMS/COMMENTS:		
			SHIRLEY MCAULIFFE , Maternal Grandmother, is Petitioner.		Need Notice of Hearing.	
>	Aff.Sub.Wit. Verified Inventory PTC Not.Cred.	X	Father: LOUIE MARTINEZ Mother: AMANDA GOODWIN Paternal Grandfather: Deceased Paternal Grandmother: Nellie Maternal Grandfather: Phillip Goy Goodwin	2.	Need proof of personal service of Notice of Hearing with a copy of the Temporary Petition at least five Court days prior to the hearing per Probate Code §2250(e) on: - Louie Martinez (Father) - Amanda Goodwin (Mother)	
	Notice of Hrg Aff.Mail	۸	Petitioner states the baby tested positive for drugs at birth and is still hospitalized and she has	3.	It appears that the mether resides	
	Aff.Pub.		not been told of his date of release. Upon his	ა.	It appears that the mother resides with Petitioner. The Court may	
	Sp.Ntc.		release, he will be coming home with Petitioner to be under her care. Therefore, she will need a		require clarification regarding	
	Pers.Serv.	Χ	temporary order to make necessary decisions		CPS involvement and this request for temporary guardianship.	
>	Conf. Screen		for him and take him to his medical		ior temporary guardianship.	
>	Letters		appointments. Petitioner states CPS wants her			
~	Duties/Supp		to obtain guardianship. Petitioner states the			
	Objections		parents are not in a position to care for their infant son. The father is homeless and has a substance abuse problem.			
	Video Receipt					
	CI Report					
	9202					
~	Order					
	Aff. Posting			_	viewed by:	
	Status Rpt				viewed on:	
~	UCCJEA				dates:	
	Citation ETP Notice				commendation:	
	FTB Notice			LIIE	e 16 – Goodwin	

Elizabeth Anne Dawson (GUARD)

Childs, Erin M. (for Barbara Hungerford and Brenda Epperson – Petitioners)

Petition for Appointment of Guardianship of the Person

Age: 14 years			TEMPORARY EXPIRES 9/4/2013	NEEDS/PROBLEMS/COMMENTS:
Co	ont. from 07241 Aff.Sub.Wit.	3	BARBARA HUNGERFORD, paternal grandmother, and BRENDA EPPERSON, sister, are petitioners. Father: WILLIAM DAWSON – Deceased.	Update: This matter will be heard in Dept. 303 at 9:00, not Dept. 71.
√	Inventory PTC Not.Cred. Notice of Hrg Aff.Mail		Mother: DEBORAH DAWSON – consents and waives notice. Paternal grandfather: William Dawson – consents and waives notice. Maternal grandfather: Deceased Maternal grandmother: Deceased.	Note: Judge Robert Oliver was disqualified pursuant to C.C.P. 170.6 on 5/21/2013.
√ ✓ ✓	Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp		Petitioners state the minor and the co- guardian, Brenda had been living with their father until he passed away. Since then they have been living with the paternal grandmother/petitioner Barbara Hungerford. The minor has a learning disability and is in a special education program. She is very stable and happy.	
<i>J</i>	Objections Video Receipt CI Report 9202 Order		Court Investigator Julie Negrete's report filed on 7/18/2013.	
✓ 	Aff. Posting Status Rpt UCCJEA Citation FTB Notice			Reviewed by: KT Reviewed on: 8/29/2013 Updates: Recommendation: File 1 – Dawson